

# MD Music Instrument Repair and Sales

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## Requirements / challenges:

- As simple to maintain as possible
- Support 10-20 employees in the beginning (10 roles)
- Website retrieves job status, inventory, pricing info from Quickbase.
- Print history report, packing slip, invoice ...
- Import addresses from Quickbase into FedEx and UPS shipping system
- Scan barcodes to update inventory
- Accounting – AR, AP, billing, general ledger (Quickbook or Quickbase or Quickbook web)
- Landing page to access all dashboards

## Design:

### Website product sales (customer access)

- Employee can add and remove products info, update shipping status on website
- Email status, log, check inventory, credit card / ecommerce, shipping
- Sale items inventory tracking
- parts pricing

### Website repair status checking (customer access)

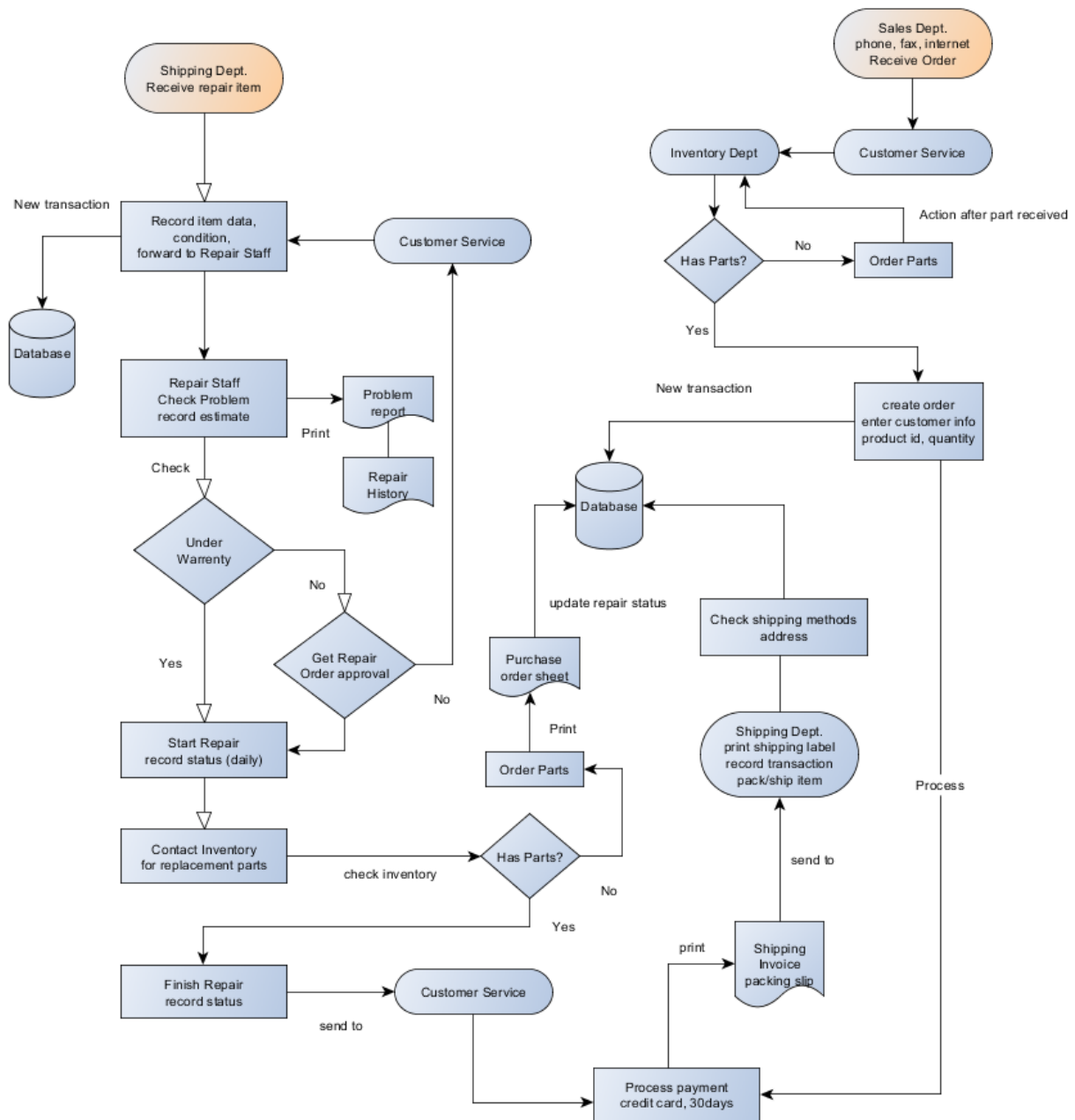
- repair items inventory tracking
- repair work status
- repair pricing

### Quickbase (employee access)

- Landing dashboard page for all users
- Repair, sales, accounting apps? Or one app for all?
- printing
  - status report
  - purchase order (for vendor order)
  - invoice for repair or purchase
  - part (internal) consumption report
  - detail instrument repair report (repair listing – check list)
  - summary instrument report (condition before/after repair)
  - work done report
  - repair/purchase history report
  - customer repair needed report (order form)
  - product shipping page (summary report, shipping info)
- Employee
  - contact information
  - salaries
  - vacations / schedule
- Customer

- Contact information
  - Repair/purchase history
  - Account balance
- Supplier
  - Contact information
  - Purchase history
  - Account balance
- Inventory List (products / parts)
- Inventory transaction
  - Type (adjustment, breakage, distribution, purchase, return to stock, sales, transfer, purchase return)
  - Print review
  - List, delete, new, confirm transaction
  - Packing list
  - Job search
- Department / Category
- Scanner Import to inventory

# Typical repair job / sales flow



## Quickbase Home Pages (dashboard)

- Personnel/Staffs/Sales Reps/HR – payroll, time sheet (access)
- Purchasing – PO Printing, parts stock/ inventory
- Inventory – items (parts or scope), count, condition, scan parts (in-House only, not for parts sale)
  - Loaner checkout/status (complete scopes)
  - Item checkout
- Accounting – AP, AR, Billing, General ledger (asset, liability, equity, income, expense)
  - QuickBooks? (currently using Peachtree)
- Contact Lookup (quick lookup)
- Job Search (repair lookup)
- Repair/QA – repair items, status, condition, warranty info, estimate time
- Shipping – shipping status
- Manufacturing (product status, delivery schedule, pricing)
- Parts Sales (orders, status)
- Company – recurring transactions, activity log
- Customers – sales receipt, income list, invoice, receive payment, accept cc, statements, print forms
- Vendors – PO, enter bill, pay bills, pay one vendor vendor credit
- Banking – cutting checks, payroll

## Rolls

- Shipping staff
- Receiving staff
- Repairman
- QA staff
- Inventory staff
- Manager
- Executive Manager (full access)
- Accounting staff
- Sales staff / Customer service
- Temp Helper

## Reports

- Purchase orders
- Instrument repair invoice
- Instrument repair check list

## Tables

- Orders (transactions)
  - Order type (repair , sale, purchase, return, exchange)
  - Items in the Order

- Order Status id
- Customer Id
- Payment Id
- Comment
- Warranty Id (not applicable)
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- Order Status
  - Status (Started, Order Placed, Received, Check Stock, Shipped, Completed)
  - Date
- Items in the Order (transaction list)
  - Order id
  - Item id
  - Quantity
- Payments
  - Payment Method
  - Amount
- Contacts
  - Addresses
  - Phones
  - Name
  - Email
  - Id
- Addresses (id)
  - Type (home, office)
  - Date from
  - Date to
  - State
  - Country
  - City
  - Address line1
  - Address line2
- Phones (id)
- Employees (id)
  - First name
  - Last name
  - Department
  - Phone ids
  - Address ids
  - Emails
- Employee Status
  - Status (active, terminated, quit)
  - Date from
  - Date to

- Roles (id)
  - Employee
- Skills
  - Employee id
  - Skill code
  - Skill level code
- Skill Codes
  - Skill name
  - Skill Detail
- Skill levels
  - Level (1 beginner - 5 master)
- Repairs
- Companies (id)
  - Contacts
  - Company address
- Price list
  - id,
  - price
  - date
  - item id array (more than one id for combo pricing)
- Price discount
  - Discount percentage
  - Comments
  -
- Inventory
  - Item id
  - Quantity
  - Date (as of)
- Items
  - Description
  - product Type
  - price id
  - reorder level
  - reorder quantity
  - product name
- product types
  - parent product type (parts, complete product)
  - description